

**PENSIONS**  
INVESTMENTS  
LIFE INSURANCE



**Irish Life**

**HAVE YOU REVIEWED  
YOUR RETIREMENT  
PLAN THIS YEAR?**



## HAVE YOU REVIEWED YOUR RETIREMENT PLAN THIS YEAR?

Keeping a watchful eye on how your retirement plan is performing is something we all know we should do, but don't always find the time to.

Your pension needs a yearly review to make sure it's performing the way you had anticipated.

Why not see how you score on our pension's checklist below and see if your pension is on track or if it's time to arrange your yearly review.

### PENSIONS CHECKLIST

*Take a look at the questions below, and tick each question that you would answer **YES** to.*

- ☐ Do you know what type of funds your pension is invested in?
  - ☐ Are you on track with your expected retirement income?
  - ☐ Have you met your Financial Adviser in the last year?
  - ☐ Do you take time to read your annual statements or keep track online?
  - ☐ If you are a couple, are you both maximising your income tax relief benefits?
  - ☐ Do you know that you may be able to arrange Pension Life Insurance and claim back income tax relief if you are eligible?
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*Count the number of questions you ticked and find out what the next steps are for your score.*

SCORE	WHAT TO DO NEXT
1-4	It's time to start thinking about your retirement plan now. Make sure you organise your yearly review with your Financial Adviser.
5-6	Well done! You seem to be up-to-date with your plan. Make sure you keep talking to your Financial Adviser and arrange your yearly review.

## TIME TO ARRANGE YOUR YEARLY REVIEW

Each of us has different expectations of how our lives will be at retirement. That's why a review of your retirement plan is designed to be as individual as you are.

In your review a Financial Adviser can discuss all aspects of your pension and your plan for the year ahead. After the meeting you will receive a personalised report outlining what was discussed and the complete details of all recommendations.



*It's completely free*  
so make sure you talk to your  
Financial Adviser today to  
book your yearly review.

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# Irish Life



## NEED SOME ADVICE?

To discuss your retirement plan contact  
your Financial Adviser today.

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Irish Life Assurance plc is regulated by the Central Bank of Ireland.

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